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ABSTRACT

This survey was concerned with the present level of professional development of financial aid officers, their training needs, and their attitudes concerning future development of the profession. Results were based upon responses of aid directors at a representative group of 122 institutions in the West. Some of the principal findings were: (1) annual turnover appears to be somewhat lower and interinstitutional hiring somewhat higher than was true 4 years ago; (2) academic courses in each of 10 different areas were judged "very useful" by 50 to 90 percent of those who had taken the course; but in most cases fewer than 1 aid officer in 3 had taken the course; (3) three out of 4 aid officers felt that various forms of job orientation were desirable; (4) workshops were the favored method of maintaining professional competence and favored topics were such issues as minority/poverty problems, status of state and federal aid bills, and recent aid literature and research. (Author/AF)

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# Professional Development of Financial Aid Officers

Warren W. Willingham

## Higher Education Surveys
## Report No. 2

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College Entrance Examination Board, November 1970

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Higher Education Surveys is an activity of the College Entrance Examination Board. The purpose is to provide member institutions with a convenient means of gathering pertinent information about important current problems in college admissions. The survey described in this report was executed by the Western Committee for Higher Education Surveys No. 2 with the staff support of Warren Willingham and Richard Ferrin of the College Board's Access Research Office in Palo Alto, California, and William Van Dusen and Robert Cameron of the Western Regional Office, also in Palo Alto. The Western Committee is responsible for defining the topic and specific questions included in this survey. The College Board staff is responsible for gathering the data and reporting the results. Since a primary objective of this project is to make known the results obtained from the committee's questionnaire as rapidly as practical, this staff report is a factual accounting without interpretation or evaluation. Appreciation is expressed to the many respondents who made this rapid survey possible by returning questionnaires within a few days.

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## Abstract

This survey was concerned with the present level of professional development of financial aid officers, their training needs, and their attitudes concerning future development of the profession. Results were based upon responses of aid directors at a representative group of 122 institutions in the West. Principal findings were:

1. Annual turnover appears somewhat lower and interinstitutional hiring somewhat higher than was true four years ago. Some nine out of ten moderate-to-large aid programs in the West are now administered by a full-time aid officer (or more than one part-time).
2. Academic courses in each of ten different areas were judged "very useful" by 50-90% of those who had such a course; in most cases, fewer than one aid officer in three had taken the course.
3. Typically, three out of four aid officers felt that various forms of job orientation were desirable; one in three reported having received such orientation themselves.
4. Workshops were the favored method of maintaining professional competence; favored topics were current issues such as minority/poverty problems, status of state and federal aid bills, and recent aid literature and research.
5. One out of three aid officers can be classified at a low level of professional development in the sense that they are involved in few professional activities. This group includes almost half of junior college aid officers and three-fourths of part-time aid officers working alone.
6. The steps most often recommended for furthering development of the aid profession were development of a code of ethical standards, additional workshops, state and regional meetings, and a journal devoted to financial aid.

## Introduction

Substantial financial assistance programs for college students began to develop only during the late 1950's. These programs generated an immediate and urgent need for a specialized group of college officials to administer student aid programs, counsel students regarding their financial problems, and assume responsibility for equitable disbursement and accounting of sizable resources. Some colleges have had an aid officer for many years, but this professional speciality has developed largely within the past decade.

The purpose of this survey is to provide current information regarding levels of experience, training needs, and attitudes concerning priorities for future professional development. There are ample signs that the profession is not yet fully developed but taking steps to become so. Informal comparison of yearly rosters of financial aid officers indicates that turnover is high. Recent statistics show that aid officers receive the lowest median salary of all senior college administrators ("Chronicle of Higher Education", 1970). But leaders in the profession evidence much interest in improving levels of competence and professional standards, and associations of aid officers have developed rapidly in recent years.

In a detailed study Nash (1968a) documented a great deal of useful information concerning the aid officer in the senior institution--his characteristics and attitudes, the nature of his work, and his relations with colleagues and those he serves. In general, Nash found his respondents to be well-educated, mature administrators who are reasonably well satisfied with the nature of their work. Puryear (1969) repeated Nash's survey questionnaire in some 340 two-year colleges and obtained generally similar results. The two-year aid administrator was slightly older than his four-year counterpart but tended to have a smaller supporting staff.

An understandable difference lay in the fact that senior college aid officers are much more likely to have graduated from their college of employment than are those in junior colleges.

In a subsequent article, Nash (1968b) commented upon weaknesses in the aid profession associated with its youth and made several general suggestions regarding the need for professional development. There is some question, however, regarding the priorities Nash chose to emphasize. He placed greater stress upon the need for aid officers to read research literature and carry out studies than upon their specific requirements for adequate training and maintenance of professional competence.

The financial aid profession has been especially sensitive to the need for further development. Professional communications emphasize this fact (e.g., Huff, 1970). Indeed, professional organizations in some areas have proliferated. There are, for example, five in the state of California (WASFAA, 1970). The National Council of Student Financial Aid Administrators represents the interests of six regional associations. It has laid plans for a number of professional activities and services to be developed over the next several years.

Nonetheless, these activities are yet quite limited, and they relate more directly to the organization of professional affiliation than to the development of professional competence. While there are various useful publications concerned with the fundamentals of administering an aid program (e.g., Van Dusen and O'Hearne, 1968; College Entrance Examination Board, 1968), such materials form only a temporary basis for adequate professional understanding. Leaders in the aid profession recognize the need for a more systematic effort to insure that financial aid officers achieve a level of professional competence commensurate with their responsibility.

A hindrance is the lack of adequate information concerning the present status of aid officers. Though the Nash study was useful in describing many characteristics of aid officers some five years ago, it did not provide the sort of specific information helpful in considering useful next steps in the development of a rapidly changing profession. The purpose of this survey was to provide current information, highly focused on the present degree of professionalization, the training needs, and judgments concerning alternatives for professional development.

Towards these ends, information was obtained directly from a representative group of financial aid officers in the Western United States. (See list of respondents on pp. 39-40) While this section of the country is not presumed to be greatly different from other regions with respect to the questions at hand, caution must naturally be exercised in generalizing too readily.

## Procedure

An important objective of Higher Education Surveys is to produce results quickly without the usual lag between collecting data and reporting research findings. Consequently, the survey procedures and the questionnaire itself were designed to facilitate rapid responses from the colleges and rapid analysis. A single-page questionnaire was used, and answers to practically all questions were quantifiable. (See questionnaire on p. 41)

A committee of leaders in education and financial aid in the Western United States (see list at front) was formed to develop the questionnaire and to assist in the conduct of this study. The Western committee devoted one meeting to a thorough discussion of the problems of professional development in financial aid and to identification of particular issues deserving study. These issues identified by the committee centered around current professional charac-

teristics, degree of professionalization, training and orientation, maintaining professional competence, and other forms of needed professionalization. At a meeting on October 12, the committee selected and edited the specific questions included in the questionnaire.

This survey was based upon a representative sample of Western institutions. As Table I indicates the sample was drawn so as to achieve the proper balance of colleges with respect to size, control, and selectivity. Religious and special institutions were also sampled separately. The former are not necessarily colleges with a formal religious affiliation, but those which place heavy emphasis upon religious practice or training for religious work; the latter specialize in fields such as music and art.

The sampling proportions were set so that sufficient returns would be available for analysis of three basic groups of colleges: Private, public 4-year, and public 2-year. This breakdown required oversampling among public 4-year institutions (including universities), but final results were adjusted so that all institutions were weighted properly.

In many cases the results were also analyzed on two other dimensions judged particularly important by the committee: The aid officer's time in profession and size of the aid program at the college. Time in profession was handled simply by separating all respondents into three groups: Those who had been in aid work less than one year, one to three years, and over three years. The committee decided that number of aid applicants was the most practical and defensible means of identifying the size of the aid program.

Questionnaires were mailed on October 14 to the Director of Financial Aid or that individual who assumes day-to-day operational responsibility for administrating the aid program. By October 28 usable replies had been obtained from 91% of the 134 colleges in the original sample. (See list on p. 39.)

## Results

### Professional characteristics

The aid profession is not plagued with inexperience to the extent it was a few years ago. The typical Western aid officer in private or public 4-year institutions has worked in financial aid for three or more years, though those in 2-year colleges have less tenure (Table 2). Relatively few aid officers have less than one-year experience, and these tend to be concentrated in the institutions with small aid programs.

Turnover has evidently reduced somewhat since Nash reported that 38% of aid directors changed jobs during a one-year interval. The corresponding figure for this Western group four years later was 28%. There also appears to be some movement toward interinstitutional hiring. Whereas Nash reported that only one in twenty aid officers held a previous position in financial aid at another college, the data of this survey indicate that among those recently hired, one in three was recruited from another college (Table 3). Half of these had worked in an aid position.

In this sample of colleges, it appears that the part-time aid administrator who works without additional professional support is largely a phenomenon of the college with a small aid program. Some 15% of the colleges in the West have less than 300 applicants; the other colleges divide almost equally between those with fewer or more than 1000 applicants. Most of those colleges with less than 300 aid applicants handle aid on a part-time basis. In better than nine cases out of ten, the larger programs have at least a full-time equivalent professional in charge (Table 4).

While the aid officers administering the larger programs are likely to be more experienced, full-time personnel, they also receive more support for professional development from their institutions. Aid administrators in public 4-year institutions and those handling more than 1000 applicants a year are much more frequently

granted released time (Table 5) and reimbursed expenses (Table 6) for professional activities. This is particularly true of meetings out-of-state and outside professional activities.

Despite differences in opportunity for professional development, respondents in different situations reported similar levels of responsibility for policy decisions. Indeed the administrators who most frequently reported primary responsibility for financial aid policy on their campus were those at 2-year colleges where institutional support for professional development is often the most limited (Table 7).

Academic background

Among those academic areas included in the questionnaire, some were judged "very useful" far more frequently than others. In general, the courses having direct application to aid administration were most often cited as useful (Table 8). For example, school law was checked by only 31% of respondents while five out of six respondents checked Counseling and also Need Analysis. The more practical courses were cited especially often by aid officers who have achieved only a relatively low level of professionalization*.

A consistent aspect of Table 8 is the fact that a larger percentage of aid officers who had had a particular course rated the course as very useful than did the total group of respondents. In some cases the difference was substantial. For example, only 28% of all respondents cited Finance and Taxation as a very useful course, but the percentage was 61% among those who had actually taken such a course. In each of the academic areas listed, the majority of respondents who had had such a course felt that it was

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*See subsequent section for definition and data on levels of professionalization.

very useful. In the case of counseling, 98% viewed some coursework helpful.

The findings on the number of aid officers who have taken academic coursework present a different picture. While the percentages vary from course to course, typically less than one respondent in three had taken any one of the courses listed in Table 9. A number of discrepancies are apparent in comparing Table 8 and Table 9. Slightly over half of all respondents had taken a course in Counseling while less than one in five had taken a course in Data Processing, Aid Administration, or History and Philosophy of Financial Aid. All four of these courses were judged very useful by a large majority of those who had had any experience with the course.

The data do not indicate any marked differences in the extent of academic coursework among aid officers at different types of institutions. Also, there is no clear indication that persons entering the aid profession recently are any more likely to have taken relevant courses than those who entered the profession several years ago. The results do indicate that administrators of large programs are more likely to have taken relevant courses than those who handle small aid programs. The data are not sufficiently reliable to lay much store in differences among groups in the particular pattern of courses taken.

Job orientation

Most respondents were very much in agreement on the matter of job orientation. Typically, three out of four felt that those types of orientation listed in Table 10 are desirable for new aid officers. The need for orientation was expressed especially frequently by aid officers working in institutions with large aid programs.

Results in Table 11 indicate an apparent discrepancy between the cited need for job orientation and the orientation actually

provided. Typically, three out of four aid officers feel that various forms of orientation are important, but only one out of three report having received any such orientation themselves. This situation does not differ consistently among different types of institutions, though Table 11 does provide some spotty evidence that officers new to the profession are somewhat more likely to be receiving orientation than was true in the case of those who entered three or more years ago.

Table 12 provides detailed information concerning respondents' views of the "most useful" workshop topics for new aid officers. Topics most frequently checked are usually concerned with the immediate problems of coping with the administrative responsibility an aid program entails. The views of aid officers in different situations did not vary greatly on this question.

Approximately three respondents in five favored the internship as the best method for new aid officers to gain practical work experience. Other respondents split almost evenly between the summer institute and on-the-job training. Aid officers who recently entered the profession were more likely to favor summer institutes than were other groups. This may be a reflection of the training problem facing an individual already bearing responsibility for an aid program (Table 13).

Maintaining professional competence

Workshops and professional meetings were favored by the largest number of respondents as preferred methods of maintaining professional competence (Table 14). One interesting finding was the fact that self-instructional materials (if available) were seen as a desirable method by more than half of the respondents. Coursework, on the other hand, was checked least often.

Aid officers in different situations did not differ markedly in their preferences among methods of maintaining competence, but the more experienced respondents did lean toward traditional approaches such as meetings and journals. Junior college aid officers were more likely to regard summer institutes as an appropriate method than were officers from other types of colleges.

The workshop topics aid officers judged "most useful" for maintaining professional competence of experienced professionals were those topics which are more likely to have current relevance and represent new information (Table 15). Examples include: Status of aid bills, minority/poverty issues, trends in education, recent literature and research findings, etc.

Variations in the collective judgments of officers in different settings seem to reflect variation in the nature and level of their involvement with financial aid problems. Respondents from 4-year public (typically large) institutions stressed more policy-oriented interests; those from colleges with small programs checked fewer workshop topics and preferred the more practical ones; those from community colleges also leaned to practical topics with special emphasis on need analysis.

Degree of professionalization

Table 16 shows the percentage of various groups of respondents who reported different professional activities. These examples of professional behavior range from very common activities (e.g., reading newsletters, attending meetings) to fairly uncommon activities characteristic of individuals who have become closely identified with the profession and who exercise special initiative in their professional activity (e.g., publishing papers, serving as an officer of an association).

It is first noteworthy that one out of four financial aid officers do not ordinarily attend meetings of aid associations, and two out of five do not read either "Chronicle of Higher Education" or "Higher Education and National Affairs"--two of the more prominent periodicals reporting national developments relevant to the aid profession. The middle three items listed in Table 16--attendance at a meeting of secondary professional interest, participation in an aid meeting, and committee work for an aid association--are examples of activities which are probably common in well-developed professions. Typically, no more than one out of three aid officers reports these activities.

The professional activities of high frequency--the first four in Table 16--are characterisitic of aid officers in all situations. It is the less common activities which clearly differentiate respondents from colleges with small aid programs or aid officers new to the field.

In order to provide some means of estimating the extent of professionalization of different groups of aid officers, each respondent's answers to the question on professional activities was scored from zero to ten according to the number of activities checked. This provides a rough index of professionalization for each respondent, valid only for group comparisons and to the extent that such items as those listed do represent meaningful professional activities. All scores were grouped into high, medium, and low levels of professionalization. Since the four most common activities are relatively passive and not very demanding, a score of less than four was designated "low." A score of seven or higher was designated "high" on the grounds that this score implies that the respondent checked at least half of the remaining six activities, each of which requires somewhat more initiative.

Table 17 shows the relationship between these levels of professionalization and other characteristics of aid officers. It is evident that the highly professionalized aid officer is usually an experienced officer at a large institution. Of special interest is the fact that more than one in three aid officers fall into the low level of professionalization. Respondents at this low level of professional development constitute:

-almost half of junior college aid officers
-two-thirds of all respondents from colleges with small aid programs
-almost three-fourths of part-time respondents working without additional professional assistance
-one-third of respondents who report primary responsibility for aid policy on their campus

Needed professional development

Among various suggested avenues for furthering professional development, roughly one respondent in two marked the following as "very important": State meetings, regional meetings, code of ethical standards, a journal devoted to financial aid, and additional workshops. Professional leaders were less inclined to value additional workshops and more inclined to value a set of recommended credentials. In most cases there were not large differences in the judgment of respondents from different types of institutions, though the need for a code of ethical standards was frequently cited by aid officers from private colleges. Also, the need for additional workshops was noticeably lower among respondents from public senior colleges than from other types of institutions (Table 18).

In response to the question of what function a national executive secretary should serve, there was relatively good agreement among respondents at different types of institutions. The functions

most often designated "very important" were general forms of representation such as testifying on federal bills and reporting Washington activities (Table 19).

Three types of service or ethical standards were frequently judged "very important". These were responsibility to students, responsibility to the college, and confidentiality of records (Table 20). There were not marked differences in the judgments of respondents from different types of institutions, but there were two sizable discrepancies in the response of professional leaders. This latter group placed much more emphasis than did other respondents upon the aid officer's relationship to his public constituency and the high schools from which his students come.

Respondents offered a wide variety of comments and suggestions regarding steps most needed in furthering professional development. Many aid officers voiced the opinion that college administrators and faculty fail to understand the importance of the aid function. Respondents often blamed this condition upon a lack of understanding of purpose and functions within the profession. One aid officer cited a need for "the development of a clear and concise statement of the role of an aid officer in the administration of a college. The aid officer himself needs a clear view of his relationship to others."

As would be expected different people see different routes to their own image of the profession. Many cited the need for specific academic or credential requirements to up-grade the profession. Some see this development initiated by the national association. As one respondent put it, "I feel the professional development of aid officers hinges upon the success of a strong, adequately funded national organization to take the lead in developing the profession."

A significant minority chose to place special emphasis upon the humanistic demands of the aid profession. One called for "a new emphasis on financial aid as a kind of personal art which will enable the aid officer to get away from viewing himself as a need-analyses technician." As another respondent put it, "We have to keep the profession as human as possible."

Table 1. The total population of Western colleges and the constitution of the original sample and actual respondents

| Type | All colleges | Sample ratio | Original sample | Actual respondents | % of original sample | % of actual respondents |
|---|---|---|---|---|---|---|
| Public | | | | | | |
| Four-year | | | | | | |
| Selective-over 15,000 | 17 | .6 | 10 | 10 | 7% | 8% |
| Selective-5,000-15,000 | 20 | .6 | 12 | 12 | 9 | 10 |
| Selective-under 5,000 | 13 | .6 | 8 | 8 | 6 | 7 |
| Non-selective-over 5,000 | 10 | .6 | 6 | 5 | 4 | 4 |
| Non-selective-under 5,000 | 14 | .6 | 8 | 8 | 6 | 7 |
| Two-year | | | | | | |
| Over 3,000 | 81 | .3 | 24 | 20 | 18 | 16 |
| Under 3,000 | 81 | .3 | 24 | 22 | 18 | 18 |
| Private | | | | | | |
| Liberal Arts | | | | | | |
| Selective-over 1,000 | 29 | .3 | 9 | 8 | 7 | 7 |
| Selective-under 1,000 | 20 | .3 | 6 | 6 | 4 | 5 |
| Non-selective-over 700 | 11 | .3 | 3 | 3 | 2 | 2 |
| Non-selective-under 700 | 12 | .3 | 4 | 2 | 3 | 2 |
| Religious | | | | | | |
| Over 1,000 | 15 | .3 | 5 | 5 | 4 | 4 |
| Under 1,000 | 36 | .3 | 11 | 10 | 8 | 8 |
| Special purpose | 13 | .3 | 4 | 3 | 3 | 2 |
| Total | 372 | | 134 | 122 | 99 | 100 |

Table 2. Percentage of aid officers who have worked in financial aid for various periods of time-- by type of institution and size of aid program

| | % Having worked in aid for: | | |
|---|---|---|---|
| | Less than 1 year | 1-3 Years | Over 3 years |
| Type of institution | | | |
| Private | 14% | 41% | 46% |
| Public 4-year | 12 | 21 | 67 |
| Public 2-year | 19 | 50 | 31 |
| Size of aid program | | | |
| Under 300 applicants | 25 | 38 | 37 |
| 300-1000 applicants | 14 | 49 | 36 |
| Over 1000 applicants | 5 | 29 | 65 |
| All respondents | 15 | 40 | 44 |

**Table 3. Turnover in financial aid positions and interinstitutional hiring--by type of college and size of aid program**

| | % in this position less than 1 year | % of those hired in past year who came from another college |
|---|---|---|
| Type of institution | | |
| Private | 23% | 25% |
| Public 4-year | 30 | 31 |
| Public 2-year | 31 | 38 |
| Size of aid program | | |
| Under 300 applicants | 29 | 33 |
| 300-1000 applicants | 28 | 23 |
| Over 1000 applicants | 27 | 47 |
| All respondents | 28 | 33 |

Table 4. Type of position held by aid officers--by type of institution, size of aid program, and time in profession

| | % Working: | | |
|---|---|---|---|
| | Full-time | Part-time, alone* | Part-time, with others* |
| Type of institution | | | |
| Private | 51% | 35% | 14% |
| Public 4-year | 86 | 2 | 12 |
| Public 2-year | 55 | 33 | 12 |
| Time in profession | | | |
| Less than 1 year | 68 | 26 | 6 |
| 1-3 years | 57 | 25 | 19 |
| Over 3 years | 61 | 30 | 9 |
| Size of aid program | | | |
| Under 300 applicants | 21 | 70 | 10 |
| 300-1000 applicants | 72 | 11 | 17 |
| Over 1000 applicants | 87 | 4 | 9 |
| All respondents | 60 | 27 | 12 |

*Designation "alone" versus "with others" refers to professional staff only.

Table 5. Percentage of institutions providing released time for activities related to professional development--by type of institution and size of aid program

| Type of activity | % Providing released time | | | | | | |
|---|---|---|---|---|---|---|---|
| | Type of institution | | | Size of aid program | | | |
| | Private | Public 4-year | Public 2-year | Under 300 | 300-1000 | Over 1000 | All respondents |
| Meetings within state | 86% | 91% | 83% | 78% | 88% | 93% | 86% |
| Meetings out-of-state | 49 | 70 | 40 | 32 | 48 | 73 | 50 |
| Coursework related to job | 27 | 58 | 26 | 22 | 30 | 51 | 33 |
| Outside professional activities | 22 | 51 | 31 | 14 | 34 | 49 | 32 |
| Attendance at workshops | 73 | 91 | 76 | 62 | 81 | 93 | 78 |

Table 6. Percentage of institutions providing reimbursed expenses for activities related to professional development--by type of institution and size of aid program

| Type of activity | % Providing reimbursed expenses | | | | | | |
|---|---|---|---|---|---|---|---|
| | Type of institution | | | Size of aid program | | | |
| | Private | Public 4-year | Public 2-year | Under 300 | 300-1000 | Over 1000 | All respondents |
| Meetings within state | 89% | 95% | 93% | 81% | 100% | 93% | 92% |
| Meetings out-of-state | 49 | 72 | 40 | 32 | 49 | 73 | 50 |
| Coursework related to job | 30 | 33 | 5 | 13 | 20 | 27 | 20 |
| Outside professional activities | 19 | 37 | 19 | 8 | 24 | 38 | 23 |
| Attendance at workshops | 76 | 79 | 81 | 68 | 86 | 80 | 79 |
| Office subscriptions | 70 | 72 | 45 | 44 | 63 | 75 | 60 |

Table 7. Extent to which aid officers report they are responsible for determination of aid policies on their campuses--by type of institution, size of aid program, and time in profession

| | % Who report being responsible | | |
|---|---|---|---|
| | Primarily | Partially | Slightly* |
| Type of institution | | | |
| Private | 57% | 43% | - |
| Public 4-year | 74 | 23 | - |
| Public 2-year | 86 | 12 | - |
| Size of aid program | | | |
| Under 300 applicants | 65 | 35 | - |
| 300-1000 applicants | 68 | 32 | - |
| Over 1000 applicants | 80 | 17 | - |
| Time in profession | | | |
| Less than 1 year | 70 | 30 | - |
| 1-3 years | 72 | 24 | - |
| Over 3 years | 76 | 24 | - |
| All respondents | 73 | 26 | - |

*Only one respondent indicated slight responsibility

Table 8. Percentage of aid officers judging various academic courses "very useful"--by degree of professionalization and whether respondent had direct experience with such a course

| | % Judging course very useful | | | |
|---|---|---|---|---|
| | Professionalization* | | Respondents who had such a course | All respondents |
| | High | Low | | |
| Data processing | 36% | 93% | 88% | 54% |
| History & philosophy of financial aid | 61 | 97 | 82 | 67 |
| Accounting | 55 | 60 | 83 | 52 |
| Statistics | 47 | 63 | 72 | 46 |
| School law | 32 | 33 | 52 | 31 |
| Need analysis | 77 | 97 | 91 | 83 |
| Finance & taxation | 28 | 33 | 61 | 28 |
| Counseling | 73 | 90 | 98 | 84 |
| Research methods | 36 | 57 | 66 | 39 |
| Aid administration | 66 | 87 | 83 | 73 |

*See definition on page 12.

Table 9. Percentage of aid officers having taken academic courses in various areas--by type of institution, time in profession, and size of aid program

| Academic area | Type of institution | | | Time in profession | | Size of aid program* | | All respondents |
|---|---|---|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | Under 1 year | Over 3 years | Small | Large | |
| Data processing | 19% | 23% | 12% | 6% | 24% | 10% | 36% | 17% |
| History & philosophy of financial aid | 14 | 14 | 7 | 6 | 11 | 0 | 11 | 11 |
| Accounting | 32 | 28 | 36 | 32 | 34 | 16 | 40 | 33 |
| Statistics | 32 | 37 | 45 | 48 | 37 | 33 | 49 | 39 |
| School law | 16 | 21 | 50 | 35 | 27 | 22 | 29 | 31 |
| Need analysis | 24 | 28 | 17 | 19 | 22 | 16 | 27 | 22 |
| Finance & taxation | 27 | 7 | 21 | 26 | 18 | 19 | 16 | 20 |
| Counseling | 46 | 60 | 67 | 61 | 52 | 41 | 64 | 58 |
| Research methods | 19 | 42 | 36 | 42 | 27 | 24 | 42 | 31 |
| Aid administration | 11 | 14 | 12 | 19 | 11 | 10 | 11 | 12 |

*Small = under 300 applicants per year; large = over 1000 applicants

Table 10. Percentage of aid officers judging various types of job orientation desirable for new aid officers--by type of institution, time in profession, and size of aid program

| Type of orientation | Type of institution | | | Time in profession | | Size of aid program* | | All respondents |
|---|---|---|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | Under 1 year | Over 3 years | Small | Large | |
| Job responsibilities | 81% | 95% | 95% | 84% | 85% | 78% | 96% | 90% |
| Limits of authority | 70 | 77 | 69 | 68 | 61 | 51 | 80 | 71 |
| Institutional policies | 84 | 95 | 88 | 74 | 84 | 76 | 98 | 88 |
| Office administration | 73 | 93 | 71 | 71 | 80 | 62 | 85 | 77 |
| Overview of yearly work | 57 | 67 | 69 | 74 | 56 | 41 | 71 | 64 |
| Program procedures | 62 | 95 | 83 | 81 | 75 | 54 | 87 | 78 |
| Minority/poverty issues | 70 | 79 | 79 | 77 | 72 | 59 | 84 | 76 |
| Relations with other offices | 62 | 88 | 64 | 65 | 67 | 43 | 82 | 69 |
| Procedures manual | 78 | 88 | 81 | 81 | 76 | 67 | 87 | 82 |

*Small = under 300 applicants per year; large = over 1000 applicants

Table 11. Percentage of aid officers who received various types of job orientation--by type of institution, time in profession, and size of aid program

| | Type of institution | | | Time in profession | | Size of aid program* | | |
|---|---|---|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | Under 1 year | Over 3 years | Small | Large | All respondents |
| Job responsibilities | 65% | 49% | 40% | 65% | 48% | 44% | 45% | 51% |
| Limits of authority | 46 | 30 | 24 | 45 | 29 | 29 | 29 | 33 |
| Institutional policies | 65 | 42 | 55 | 65 | 43 | 51 | 47 | 56 |
| Office administration | 27 | 21 | 29 | 42 | 19 | 29 | 24 | 26 |
| Overview of yearly work | 22 | 9 | 17 | 19 | 8 | 13 | 15 | 17 |
| Program procedures | 27 | 33 | 31 | 29 | 22 | 17 | 25 | 30 |
| Minority/poverty issues | 16 | 16 | 17 | 29 | 9 | 6 | 20 | 16 |
| Relations with other offices | 22 | 47 | 33 | 32 | 34 | 17 | 45 | 32 |
| Procedures manual | 46 | 44 | 31 | 29 | 38 | 30 | 42 | 39 |

*Small = under 300 applicants per year; large = over 1000 applicants

Table 12. Percentage of respondents indicating various workshop topics as "most useful" for the training of new aid officers--by type of institution and time in profession

| Workshop topic | Type of institution | | | Time in profession | | All respondents |
|---|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | Under 1 year | Over 3 years | |
| Office procedures | 70% | 86% | 62% | 48% | 80% | 70% |
| Research methods | 41 | 47 | 38 | 35 | 44 | 41 |
| Trends in education | 43 | 37 | 45 | 27 | 38 | 43 |
| Preparing reports | 73 | 93 | 88 | 73 | 89 | 84 |
| Economic trends | 35 | 47 | 33 | 25 | 44 | 37 |
| Record systems | 59 | 77 | 86 | 59 | 80 | 74 |
| Research findings | 32 | 49 | 40 | 17 | 49 | 39 |
| Status of aid bills | 59 | 67 | 71 | 65 | 58 | 66 |
| Interview techniques | 62 | 84 | 67 | 63 | 78 | 69 |
| Recent aid literature | 57 | 72 | 62 | 60 | 64 | 62 |
| Major aid programs | 68 | 93 | 76 | 56 | 87 | 77 |
| Need analysis | 86 | 100 | 95 | 81 | 100 | 93 |
| Data processing | 32 | 67 | 38 | 17 | 62 | 42 |
| Personnel administration | 27 | 60 | 33 | 10 | 56 | 37 |
| Minority/poverty issues | 57 | 88 | 81 | 68 | 80 | 74 |

Table 13. Percentage of respondents who favor each of three methods by which new aid officers might gain practical experience--by type of institution, time in profession, and size of aid program

| | % Favoring each method | | |
|---|---|---|---|
| | Internship | Summer institute | On-job training |
| Type of institution | | | |
| Private | 63% | 11% | 26% |
| Public 4-year | 68 | 14 | 19 |
| Public 2-year | 59 | 35 | 5 |
| Time in profession | | | |
| Under 1 year | 52 | 41 | 7 |
| 1-3 years | 57 | 25 | 18 |
| Over 3 years | 72 | 12 | 17 |
| Size of aid program | | | |
| Under 300 applicants | 58 | 23 | 19 |
| 300-1000 applicants | 62 | 25 | 13 |
| Over 1000 applicants | 67 | 15 | 17 |
| All respondents | 62 | 22 | 16 |

Table 14. Percentage of aid officers reporting they would use, if available, various methods of maintaining professional competence--by type of institution, time in profession, and type of program

| Method of maintaining competence | % Who would use method | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Type of institution | | | Time in profession | | Size of aid program* | | |
| | Private | Public 4-year | Public 2-year | Under 1 year | Over 3 years | Small | Large | All respondents |
| Occasional coursework | 38% | 35% | 29% | 29% | 30% | 21% | 35% | 33% |
| Workshop | 76 | 86 | 88 | 81 | 75 | 70 | 84 | 83 |
| Professional meetings | 70 | 81 | 81 | 55 | 82 | 62 | 85 | 77 |
| Professional journals | 59 | 65 | 52 | 48 | 64 | 43 | 78 | 58 |
| Summer institute | 24 | 33 | 55 | 52 | 31 | 30 | 38 | 39 |
| Self-study materials | 59 | 51 | 60 | 55 | 57 | 57 | 58 | 58 |

*Small = under 300 applicants per year; large = 1000 applicants

Table 15. Percentage of experienced* aid officers in different types of institutions and programs who judge various workshop topics as "most useful" for maintaining professional competence of experienced officers

| Workshop topic | Type of institution | | | Size of aid program | | All respondents |
|---|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | Small | Large | |
| Office procedures | 13% | 26% | 32% | 17% | 19% | 24% |
| Research methods | 59 | 50 | 38 | 38 | 62 | 49 |
| Trends in education | 69 | 76 | 44 | 47 | 63 | 61 |
| Preparing reports | 44 | 39 | 50 | 47 | 35 | 45 |
| Economic trends | 47 | 66 | 50 | 45 | 67 | 53 |
| Record systems | 41 | 50 | 56 | 34 | 50 | 49 |
| Research findings | 56 | 71 | 50 | 26 | 65 | 57 |
| Status of aid bills | 75 | 92 | 79 | 66 | 85 | 81 |
| Interview techniques | 25 | 39 | 29 | 34 | 35 | 30 |
| Recent aid literature | 47 | 71 | 59 | 43 | 71 | 57 |
| Major aid programs | 31 | 26 | 35 | 32 | 25 | 32 |
| Need analysis | 41 | 26 | 71 | 49 | 35 | 49 |
| Data processing | 41 | 66 | 50 | 30 | 56 | 50 |
| Personnel administration | 34 | 50 | 35 | 30 | 40 | 38 |
| Minority/poverty issues | 50 | 84 | 82 | 62 | 71 | 71 |

*This table is based only upon replies of aid officers with at least one year of experience in financial aid administration.

Table 16. Percentage of aid officers who have undertaken various types of professional activity--by type of institution, time in profession, and size of program

| Professional activity | Type of institution | | | Time in profession | | Size of aid program* | | All respondents |
|---|---|---|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | Under 1 year | Over 3 years | Small | Large | |
| Read aid newsletters regularly | 92% | 95% | 86% | 84% | 90% | 78% | 95% | 90% |
| Attend aid association meetings | 65 | 88 | 74 | 55 | 80 | 51 | 84 | 74 |
| Follow progress of aid bills | 78 | 91 | 64 | 61 | 81 | 62 | 87 | 75 |
| Read "Chronicle of Higher Educ." or "Higher Educ. and National Affairs" | 65 | 84 | 45 | 55 | 66 | 51 | 84 | 61 |
| Attended ACAC, AACRAO, or APGA | 38 | 12 | 24 | 13 | 31 | 29 | 25 | 26 |
| Participated in aid meeting (read paper, led discussion) | 19 | 60 | 31 | 19 | 45 | 11 | 55 | 33 |
| Committee work for aid association | 19 | 51 | 26 | 6 | 40 | 3 | 55 | 28 |
| Published aid article | 8 | 9 | 2 | 0 | 11 | 0 | 15 | 6 |
| Served as consultant | 30 | 35 | 21 | 3 | 31 | 11 | 36 | 23 |
| Held office in aid association | 14 | 35 | 14 | 3 | 28 | 0 | 38 | 18 |

*Small = under 300 applicants per year; large = over 1000 applicants

Table 17. Percentage of aid officers at different levels of professionalization*

| | % at each level of professionalization* | | |
|---|---|---|---|
| | Low | Medium | High |
| Type of institution | | | |
| Private | 35% | 51% | 14% |
| Public 4-year | 19 | 44 | 37 |
| Public 2-year | 48 | 48 | 5 |
| Time in profession | | | |
| Under 1 year | 61 | 39 | 0 |
| 1-3 years | 40 | 56 | 5 |
| Over 3 years | 26 | 45 | 29 |
| Size of aid program | | | |
| Under 300 applicants | 68 | 32 | 0 |
| 300-1000 applicants | 29 | 61 | 10 |
| Over 1000 applicants | 13 | 47 | 40 |
| Type of position | | | |
| Full-time | 25 | 54 | 21 |
| Part-time, alone | 73 | 27 | 0 |
| Part-time, with other staff | 16 | 68 | 16 |
| Responsible for aid policy | | | |
| Primarily | 34 | 49 | 18 |
| Partially | 42 | 50 | 8 |
| All respondents | 37 | 48 | 15 |

*Professional levels are defined in terms of number of activities checked in question 12: Low = 3 or less; Medium = 4 to 6; High = 7 or more.

Table 18. Percentage of aid officers who rate various methods of professional development as "very important"--by type of institution and within a select group of professional leaders

| Method of development | Type of institution | | | All respondents | Professional leaders* |
|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | | |
| State meeting | 43% | 60% | 64% | 55% | 67% |
| Regional meeting | 51 | 60 | 60 | 56 | 63 |
| National meeting | 20 | 16 | 10 | 14 | 33 |
| National office (Exec. Secy.) | 26 | 23 | 21 | 23 | 37 |
| Code of ethical standards | 63 | 49 | 29 | 44 | 50 |
| Journal devoted to aid | 46 | 53 | 48 | 47 | 57 |
| Recommended set of credentials for aid officers | 31 | 44 | 26 | 31 | 50 |
| Graduate training programs | 29 | 44 | 38 | 35 | 43 |
| Additional workshops | 60 | 42 | 71 | 60 | 37 |

*Respondents who checked at least 7 professional activities in question 12.

Table 19. Percentage of aid officers who rate various potential functions of a national office as "very important"--by type of institution and within a select group of professional leaders

| Function | Type of institution | | | All respondents | Professional leaders* |
|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | | |
| Testify on federal bills | 86% | 84% | 74% | 81% | 87% |
| Report Washington activities | 62 | 70 | 60 | 63 | 80 |
| Represent the aid profession | 65 | 56 | 76 | 68 | 70 |
| Operate employment clearinghouse | 5 | 12 | 14 | 10 | 3 |
| Liaison with other professions | 8 | 12 | 21 | 14 | 13 |
| Advance professional development | 43 | 40 | 57 | 48 | 63 |
| Organize training activities | 41 | 49 | 62 | 51 | 47 |

*Respondents who checked at least 7 professional activities in question 12.

Table 20. Percentage of aid officers who judge the development of various service and ethical standards as "very important"--by type of institution and within a select group of professional leaders

| Service or ethical standard | Type of institution | | | All respondents | Professional leaders* |
|---|---|---|---|---|---|
| | Private | Public 4-year | Public 2-year | | |
| Professional relationships | 27% | 40% | 29% | 30% | 43% |
| Responsibility to students | 95 | 95 | 90 | 93 | 90 |
| Responsibility to the college | 73 | 63 | 69 | 69 | 73 |
| Relations with schools | 22 | 42 | 26 | 28 | 60 |
| Providing public information | 24 | 40 | 43 | 35 | 63 |
| Confidentiality of records | 54 | 74 | 74 | 67 | 73 |
| Relationships with donors | 43 | 28 | 48 | 42 | 40 |

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## Survey Respondents*

### Alaska

Anchorage Community College

### Arizona

Arizona State University
Arizona Western College
Grand Canyon College
Northern Arizona University
Prescott College

### California

Azusa Pacific College
Bakersfield College
Bethany Bible College
California College of Arts and Crafts
California Concordia College
California State College, Dominguez Hills
California State College, Hayward
California State College, Los Angeles
California State College, San Bernardino
California State Polytechnic College
Chabot College
Chaffey College
Chapman College
Claremont Men's College
College of Marin
College of the Desert
College of the Redwoods
College of the Siskiyous
Contra Costa College
Diablo Valley College
Fullerton Junior College
Hartnell College
Humboldt State College
Humphrey's College
Los Angeles Pierce College
Loma Linda University
Marymount College of Palos Verdes
Menlo College
Merced Community College
Occidental College
Palo Verde College
Pepperdine College
Pitzer College
Pomona College
Reedley College
Rio Hondo Junior College
Sacramento State College
Saint Patrick's College
San Diego City College
San Fernando Valley State College
San Francisco State College
San Jose Bible College
San Jose City College
Santa Monica College
Santa Rosa Junior College
Scripps College
Sonoma State College
Southwestern College
Stanford University
Stanislaus State College
Tahoe College
United States International University
University of California, Berkeley
University of California, Davis
University of California, Irvine
University of Judaism
University of San Diego, College for Men
Victor Valley College
West Coast University
West Hills College

*A few questionnaires were received too late to be used.

## Survey Respondents*

### Colorado

Adams State College
Arapahoe Community College
Colorado Mountain College
Colorado State University
Community College of Denver
Loretto Heights College
Saint Thomas Seminary
Southern Colorado State College
Temple Buell College
University of Colorado, Colorado Springs Center
University of Northern Colorado
Western State College of Colorado

### Hawaii

Kauai Community College
Leeward Community College
University of Hawaii

### Idaho

Idaho State University
Lewis-Clark Normal School
North Idaho Junior College
Northwest Nazarene College
Ricks College
University of Idaho

### Montana

Carroll College
Eastern Montana College
Flathead Valley Community College
Montana State University
Northern Montana College
University of Montana

### Nevada

University of Nevada, Las Vegas
University of Nevada, Reno

### Oregon

Clackamas Community College
Clatsop Community College
Concordia College
Eastern Oregon College
George Fox College
Lane Community College
Lewis and Clark College
Mount Angel College
Museum Art School
Oregon State University
Portland Community College
Southern Oregon College
Treasure Valley Community College
Willamette University

### Utah

Southern Utah State College
University of Utah
Weber State College
Westminster College

### Washington

Big Bend Community College
Edmonds Community College
Fort Wright College of the Holy Names
Olympic Community College
Peninsula College
Shoreline Community College
Skagit Valley College
Tacoma Community College
University of Washington
Walla Walla College
Walla Walla Community College
Washington State University
Western Washington State College

### Wyoming

Casper College
Sheridan College
University of Wyoming

*A few questionnaires were received too late to be used.

# Higher Education Surveys

Name _____ Institution _____

DIRECTIONS: These questions should be answered by the individual who assumes day-to-day operational responsibility for the administration of Financial Aid on your campus. Please answer each question if at all possible. Give the best judgment you can and, if you wish, explain any answer in the "comment" space on the back. Call collect 415 – 328-6150 to clarify any question. Please return by October 22.

**(1)** How long have you worked in Financial Aid?

Years _____ Months _____

**(2)** Approximately how many Aid applicants does your office handle in a year?

_____

**(3)** What was your major responsibility one year ago?

At this college:
- Same position as now ..... ( )
- Another position in Aid work ... ( )
- Another position on campus .... ( )

At another college:
- Position in Aid ..... ( )
- Another position ..... ( )

Student only ..... ( )
None of above ..... ( )

**(4)** Which best describes your present position?

Primarily Aid Administration..... ( )
Part-time Aid Administration with Aid professionals under me..... ( )
Part-time Aid Administration with no other Aid professionals in this office ..... ( )

**(5)** To support professional development of Aid Officers, does your institution provide released time and pay expenses for the following? (Check if yes)

| | Release Time | Pay Expenses |
|---|---|---|
| Meetings within state | ( ) | ( ) |
| Meetings out-of-state | ( ) | ( ) |
| Coursework related to job | ( ) | ( ) |
| Outside professional activities | ( ) | ( ) |
| Attendance at workshops | ( ) | ( ) |
| Office subscriptions | | ( ) |

**(6)** What is the nature of your responsibility in determining aid policies on your campus?

Primarily responsible ..... ( )
Partially responsible ..... ( )
Slightly responsible ..... ( )

**(7)** In your judgment, what areas of academic preparation would be especially useful for Aid Officers? In which have you taken formal courses?

| | Very Useful | I Had A Course |
|---|---|---|
| Data Processing | ( ) | ( ) |
| History & Philosophy of Financial Aid | ( ) | ( ) |
| Accounting | ( ) | ( ) |
| Statistics | ( ) | ( ) |
| School Law | ( ) | ( ) |
| Need Analysis | ( ) | ( ) |
| Finance & Taxation | ( ) | ( ) |
| Counseling | ( ) | ( ) |
| Research Methods | ( ) | ( ) |
| Aid Administration | ( ) | ( ) |
| Other (Explain over). | ( ) | ( ) |

**(8)** What types of information for job orientation are desirable for New Aid Officers? Which did you have?

| | Desirable | I Had |
|---|---|---|
| Job Responsibilities | ( ) | ( ) |
| Limits of Authority | ( ) | ( ) |
| Institutional Policies | ( ) | ( ) |
| Office Administration | ( ) | ( ) |
| Overview of Yearly Work | ( ) | ( ) |
| Program Procedures | ( ) | ( ) |
| Minority/Poverty Issues | ( ) | ( ) |
| Relations with Other Offices | ( ) | ( ) |
| Procedures Manual | ( ) | ( ) |

**(9)** Ideally, what is the best way for new Aid Officers to get practical experience? (Check one)

Internship ..... ( )
2-4 week summer institute ..... ( )
On-job training is sufficient ..... ( )

**(10)** In what ways do you prefer to keep current? Assume all are available, and check those you would likely use.

Occasional coursework ..... ( )
Workshop (2-4 days) ..... ( )
Professional meetings ..... ( )
Professional journals ..... ( )
Summer institute (2-4 weeks) ..... ( )
Self-study materials ..... ( )

**(11)** Check the most useful topics for inclusion in workshops – (A) to train new Aid Officers, and (B) to keep experienced officers current. (Mark both columns.)

| | (A) New Officers | (B) Old Hands |
|---|---|---|
| Office procedures | ( ) | ( ) |
| Research methods | ( ) | ( ) |
| Trends in education | ( ) | ( ) |
| Preparing reports | ( ) | ( ) |
| Economic trends | ( ) | ( ) |
| Record systems | ( ) | ( ) |
| Research findings | ( ) | ( ) |
| Status of Aid bills | ( ) | ( ) |
| Interview techniques | ( ) | ( ) |
| Recent Aid literature | ( ) | ( ) |
| Major Aid programs | ( ) | ( ) |
| Need analyses | ( ) | ( ) |
| Data Processing | ( ) | ( ) |
| Personnel Administration | ( ) | ( ) |
| Minority/poverty issues | ( ) | ( ) |

**(12)** Check each that you have done.

Read Aid newsletters regularly ..... ( )
Attend Aid association meetings ... ( )
Participated in Aid meeting (read paper, led discussion)..... ( )
Follow progress of Aid bills ..... ( )
Read "Chronicle of Higher Education" or "Higher Education and National Affairs"..... ( )
Attended ACAC, AACRAO, or APGA..... ( )
Committee work for Aid assoc ..... ( )
Published article on Aid ..... ( )
Served as consultant off-campus .... ( )
Held office in Aid association ..... ( )



OVER

In the next 3 questions rate each alternative: 1-Very Important, 2-Important, 3-Not So Important

**13** In developing the Financial Aid profession, how important do you rate each of the following?

Rate each: 1, 2, or 3.

State Meeting .....( )
Regional Meeting .....( )
National Meeting .....( )
National Office (Exec. Secy.).....( )
Code of ethical standards .....( )
Journal devoted to Aid .....( )
Recommended set of credentials for Aid Officers .....( )
Graduate training programs .....( )
Additional workshops .....( )

**14** If there were a national office (Executive Secretary), how important do you rate each of the following functions?

Rate each: 1, 2, or 3.

Testify on federal bills .....( )
Report Washington activities .....( )
Represent the Aid profession .....( )
Operate employment clearinghouse ( )
Liaison with other professions ....( )
Advance professional development .( )
Organize training activities .....( )

**15** The following issues concern professional service and ethics. Which most need discussion and standards?

Rate each: 1, 2, or 3.

Professional relationships .....( )
Responsibility to students .....( )
Responsibility to the college ....( )
Relations with schools .....( )
Providing public information ....( )
Confidentiality of records .....( )
Relationships with donors .....( )

**16** In your judgment what is the single most needed step in furthering the professional development of Financial Aid Administrators?

COMMENTS: Use this space to explain any answer

Use prepaid envelope provided – Return to:

**College Entrance Examination Board**
**Western Regional Office**
**800 Welch Road**
**Palo Alto, California 94304**